

ALTERNATE RETIREMENT PROGRAM (ARP) ELIGIBILITY WORKSHEET

Personnel Office: If you don't have access to DPA's **Personnel Information Exchange (PIE)** to complete the online ARP Eligibility Worksheet, you can complete this form for each new employee and retain it in the employee's personnel file. Do not mail completed form to DPA or CalPERS.

Department Name: _____

Section 1: Employee Information

Name: _____

Section 2: CalPERS Membership Category

☐ Miscellaneous ☐ Industrial ☐ Safety ☐ State Patrol ☐ POFF

If you checked Miscellaneous or Industrial complete this form. The employee may be subject to ARP. If you have checked Safety, State Patrol, or POFF do not complete this form. The employee is not subject to ARP.

Section 3: Appointment Information

- (1) Is the first hire date prior to August 11, 2004? ☐ Yes ☐ No
If Yes, do not complete this form. The employee is not subject to ARP. If No, answer the following questions.
- (2) Does the employee have prior State employment? ☐ Yes ☐ No
If Yes, was the employee a member of CalPERS? ☐ Yes ☐ No
If the answer is Yes to the prior questions, do not complete this form. The employee is not subject to ARP. If the answer is No to either portion of Question (2) the employee may be subject to ARP. Continue completing this form.
- (3) Is this a reappointment where the employee's original date of hire was more than 24 months ago? ☐ Yes ☐ No
If Yes, do not complete this form. The employee is not subject to ARP. If No, answer the following questions.

Section 4: Prior Employment not Subject to ARP

Name of Employer/Agency: _____

- (1) Is the employee a member of CalPERS, Judges' Retirement Systems (I/II), Legislators' Retirement System, CalSTRS, or the UC Retirement System? ☐ Yes ☐ No
If the answer is Yes, do not complete this form. The employee is not subject to ARP. If the answer is No, answer the following question.
- (2) Is the prior employer a CalPERS reciprocal retirement system? ☐ Yes ☐ No
If the answer is Yes, and the employment was within the six months prior to the CalPERS membership date the employee is not subject to ARP. If the employment was more than six months prior to this date the employee may be subject to ARP. Continue completing this form. If the answer is No, continue completing this form.

For a listing of the reciprocal retirement systems please refer to the *CalPERS State Handbook* or the booklet *When You Change Retirement Systems* (PERS-PUB-16). To see if the employee was a previous member of CalPERS, refer to ACES under the "Participant Inquiry Screen". If you need additional assistance contact CalPERS at 888-225-7377.

Section 5: Non-resident Alien

Is the employee a non-resident alien working under the provisions of a Visa F-1, J-1, M-1, or Q-1, and not coordinated with Social Security? ☐ Yes ☐ No

If the answer is Yes, do not complete this form. The employee is not subject to ARP. If No, continue completing this form.

Section 6: The employee is subject to ARP: Retirement Identification Codes

Departments are responsible for establishing the correct retirement ID code on the employee's employment history records. The following codes apply to employees subject to ARP:

Code Definition

TK CalPERS miscellaneous member subject to Social Security and Medicare
TP CalPERS industrial member subject to Social Security and Medicare
TR BU 18 CalPERS industrial member subject to Social Security and Medicare at Porterville Developmental Center
TG BU 02 CalPERS miscellaneous member subject to Social Security and Medicare (hired on or after 07/01/06)
TH BU 02 CalPERS industrial member subject to Social Security and Medicare (hired on or after 07/01/06)

Authorized Employer Signature _____ Date _____